



## FactSet Unveils Intelligent Platform Initiative to Supercharge Client Workflows

November 21, 2024

### Introducing a Platform-Level GenAI Search Agent for Buy- and Sell-Side Clients

NORWALK, Conn., Nov. 21, 2024 (GLOBE NEWSWIRE) -- FactSet, a global financial digital platform and enterprise solutions provider, today announced its Intelligent Platform initiative, introducing the integration of conversational AI at the platform level. The Intelligent Platform will connect an enhanced [FactSet Mercury](#), the company's conversational knowledge engine, to FactSet's AI-powered solutions through a global assistant. Clients across the buy- and sell-side can expect to experience elevated productivity and decision-making through streamlined workflows and enhanced discoverability.

Key to the strength of the Intelligent Platform is FactSet Mercury's agentic orchestration, which provides auditable answers and actionable insights to conversational queries, allowing users to simply ask for information across FactSet's vast amounts of data. This latest innovation provides next-generation search intelligence across FactSet's extensive structured and unstructured data while allowing users to forego their manual research and search processes.

The Intelligent Platform also includes Enterprise AI Building Blocks, offerings designed to bring FactSet's AI technology in-house for clients and enable technology teams to outsource the construction of complex processes to FactSet. These tools foster innovation, reduce time-to-market, and create opportunity for developers and technologists to build differentiated workflows. Currently in market are [Conversational API](#), a FactSet Mercury-powered chatbot that can be integrated within client tech stacks, and [GenAI Data Packages](#), which consolidates the critical data feeds needed to power small- and large-scale AI workflows.

Launching in early 2025, workflow solutions within the Intelligent Platform initiative will supercharge client capabilities across the sell-side and in support of the buy-side portfolio lifecycle.

- **Pitch Creator** for Bankers creates significant productivity gains for bankers and analysts by automating frequent and critical workflow tasks. From tombstone generation to chart creation, slide development and customization to working with filings, Pitch Creator leverages advanced AI to reduce the time and effort associated with all elements of building pitch books.
- [Portfolio Commentary](#), which offers AI-generated commentary to identify the key drivers of portfolio performance without the manual creation of attribution summaries, will feature expanded search and Security Explanation features, as well as batching and customization by language and security.
- [IRN 2.0](#), a FactSet Mercury-backed research management solution, seamlessly integrates with the global assistant, enabling buy-side research analysts and portfolio managers to share insights, ingest information, and search through unique internal research within the context of their portfolios.
- **An expanded solution for Corporations** will offer powerful search of both structured and unstructured sources, supporting Investor Relations and Corporate Strategy & Development teams in their research efforts and enabling them to understand how their company is positioned in the market and against peers.

"Our Intelligent Platform initiative introduces a powerful platform-wide global assistant, representing a significant advancement in FactSet's commitment to building innovative solutions that create tangible value for our clients," said Phil Snow, CEO of FactSet. "By combining this conversational AI with workflow solutions that supercharge our clients, we are enhancing client productivity and unlocking new opportunities for growth and efficiency across workflows."

The Intelligent Platform builds on the success of FactSet's 2023 [AI Blueprint](#), which outlined the company's strategy to leverage GenAI to boost client productivity through enhanced discoverability and streamlined workflows. For more information on FactSet's AI solutions, please visit [www.factset.com/ai](http://www.factset.com/ai).

#### About FactSet

FactSet (NYSE:FDS | NASDAQ:FDS) helps the financial community to see more, think bigger, and work better. Our digital platform and enterprise solutions deliver financial data, analytics, and open technology to more than 8,200 global clients, including over 216,000 individual users. Clients across the buy-side and sell-side as well as wealth managers, private equity firms, and corporations achieve more every day with our comprehensive and connected content, flexible next-generation workflow solutions, and client-centric specialized support. As a member of the S&P 500, we are committed to sustainable growth and have been recognized amongst the Best Places to Work in 2023 by Glassdoor as a Glassdoor Employees' Choice Award winner. Learn more at [www.factset.com](http://www.factset.com) and follow us on [X](#) and [LinkedIn](#).

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